

Customizing documents in CCH Entities Companies – Inserting Data Fields

Follow these steps to create a new document template in CCH Entities.

There are 2 types of merge field you may want to use:

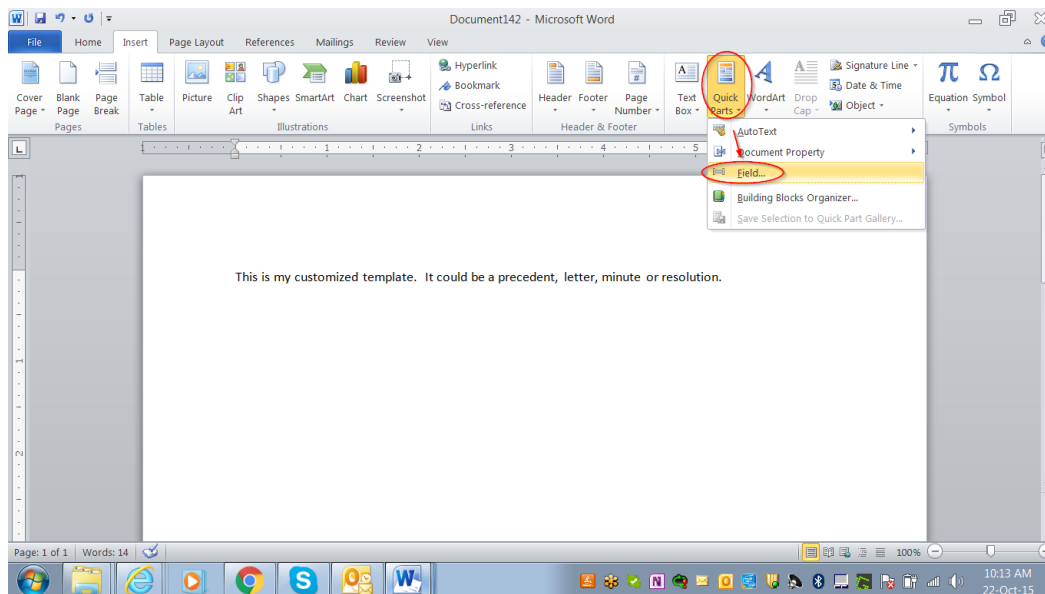
1. Standard merge field: Imports a set value, for example, Company Name.
2. User Defined merge field: Gives the user a choice when a document is created, for example, inserting a name from a list of people.

Standard Merge Fields

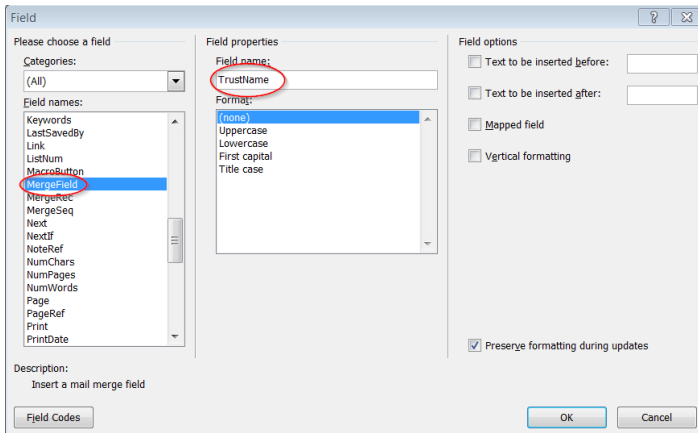
1. Create your template in **Word** leaving spaces where data is to be inserted.

Go to the first place in the document where you want to add a merge field.

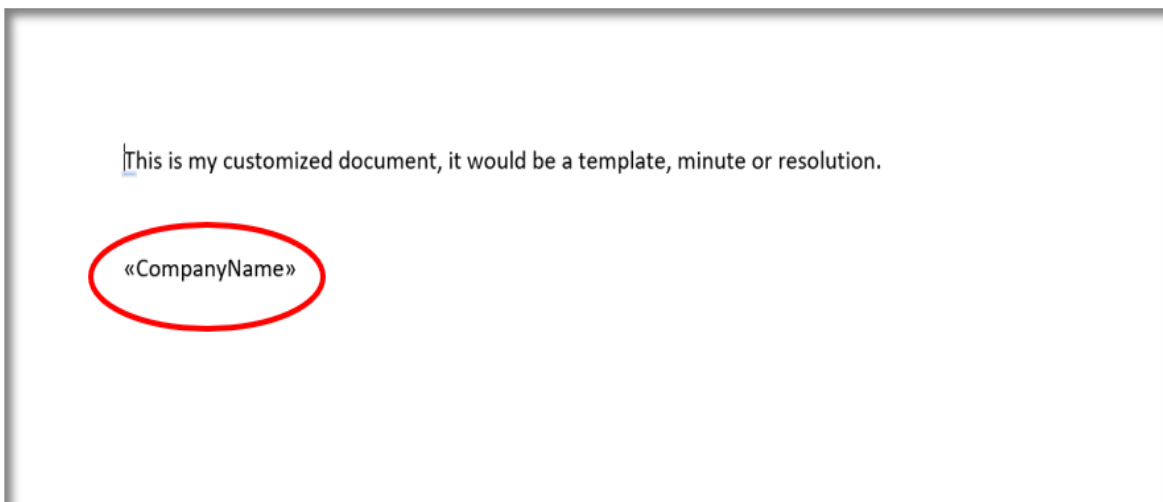
Select **Quick Parts** and **Field**.



2. Select **MergeField** and **name** the field as per the list found on page 10.



3. When this document is created in CCH Entities the relevant data will appear in the document automatically, in this example the trust name.

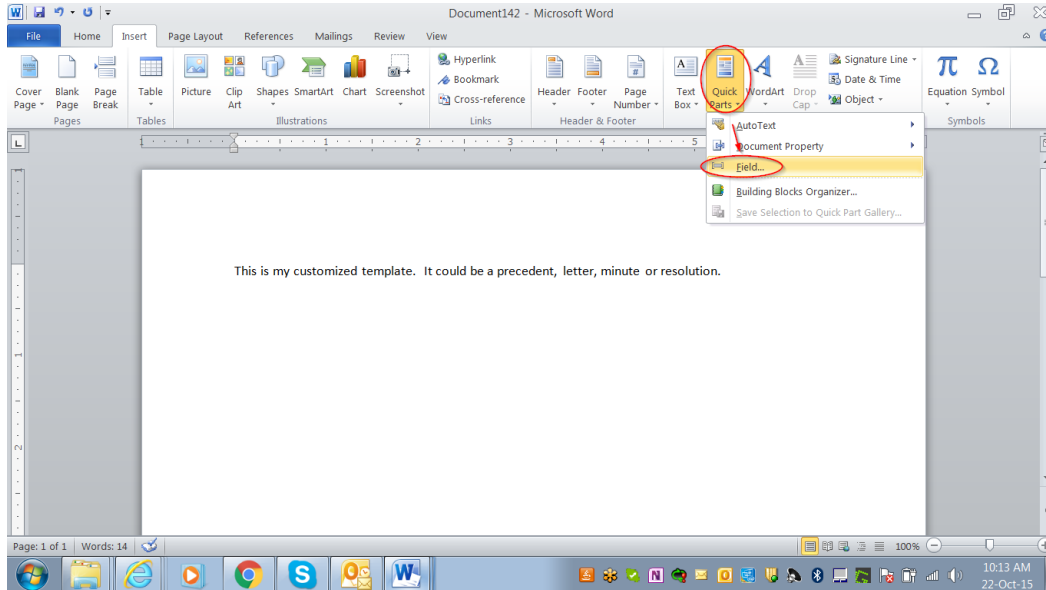


A full list of all the standard merge fields can be found in this document, starting from page 10.

4. If you do not require any User Defined fields in your document go straight to page 4, Steps 1 – 3 only.

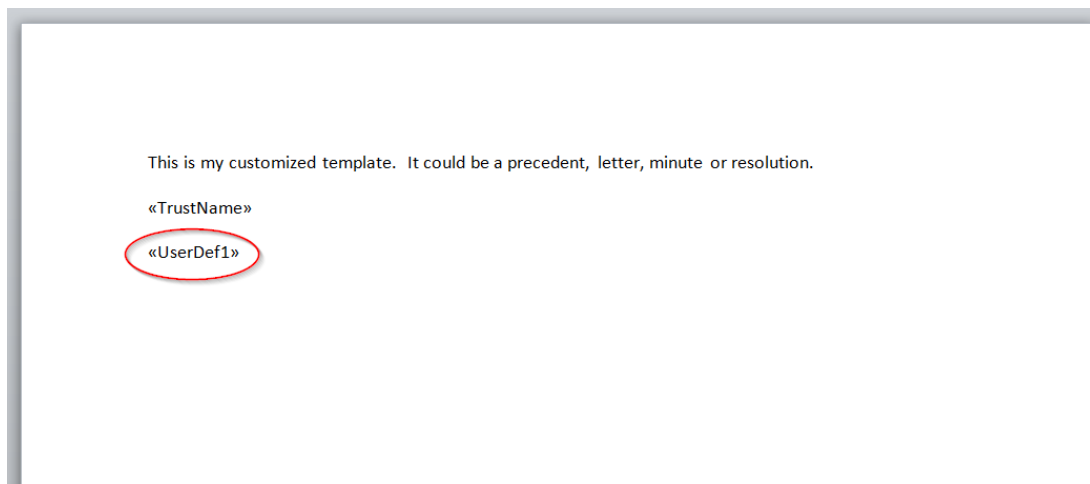
User Defined Merge Fields

1. Create your template in **Word**. Go to the first place in the document where you want to add a User Defined merge field. Select **Quick Parts** and **Field**.



2. Select **MergeField** and **name** the field **UserDef1**.

Name each subsequent UserDefined field with the next number, UserDef2, UserDef3, etc. You do not specify what data you want to add in each merge field until the document is uploaded to the CCH Entities software.



Adding your document to the CCH Entities master template list

1. Go to **Setup**, then select **Master Templates**.

Dashboard Companies Reports Setup About Logout ? CCH Companies

Setup CCH Training (Companies Only) Limited - Suzy Hardy

- Users
 - Logins
 - Managers
 - Personal Setup
- Templates
 - Checksheets
 - Email Templates
 - Master Templates**
 - Task Templates
- Entry Types
 - Person Titles
- Setup
 - AML Documents
 - Banks
 - Company Setup
 - Company Types
 - Dynamic Company Data
 - Dynamic Person Data
 - Required Company Data
 - Required Person Data
 - Share Classes
 - System Setup

2. Select **New**

New

View / Modify

Delete

Copy

Print Summary

Back to Setup

| Type | Sort Code | Keycode | Name |
|-------------|-----------|-----------|--|
| | 0 | aa01 | My Customised document with merge field |
| Agenda | 0 | CAGEAN001 | Agenda for Annual Meeting of Shareholders |
| Agenda | 0 | CAGEAN001 | CCH Agenda for Annual Meeting of Shareholders |
| Certificate | 0 | CCERAP15 | Directors' certificate under s 161(4) re remuneration contract |
| Certificate | 0 | CCERAP16 | Directors' certificate under s 161(4) re fees at end of year |
| Certificate | 0 | CCERDI03 | Solvency certificate for distribution of dividend (option A - all shareholders) |
| Certificate | 0 | CCERDI07 | Solvency certificate for distribution of dividend (option B - selected shareholders) |
| Certificate | 0 | CCERFI04 | Directors' certificate (ss 76(4), 77(2)) - financial assistance |
| Certificate | 0 | CCERFI08 | Directors' certificate (ss 76(4), 77(2), 78(3)) - financial assistance |
| Certificate | 0 | CCERFI15 | Directors' certificate (s 108(2)) - financial assistance |
| Certificate | 0 | CCERIN02 | Certificate of non-revocation of power of attorney (individual) |

- Name the document, add a Keycode, add a Sort Order (this will control where your document appears in the list) and finally upload your Word document.

- If there are no User Defined merge fields the process is complete, otherwise continue to Step 5.

- Select **Merge Fields**, then **Add**.

- Add the type of information you would like to select when creating this document with your company data.

Merge Field ?

Merge Field: USERDEF1

Description:

Option Type: Please Select Add Manager Names Add User Names

Options:

Gifting Options:

Required Field

Notes:

In this example we are selecting from a list of full names. This will show the full names of everyone linked to the company.

Merge Field ?

Merge Field: USERDEF1

Description: Select the name(s) of the person(s) who is living at the property

Option Type: People Full Name Add Manager Names Add User Names

Options:

Gifting Options:

Required Field

Notes:

Some of the other options include first names, addresses, dates or memo (where the user can type a whole paragraph of information). Leave the **Option Type** blank for a simple, short 'free type' field when the document is created.

The screenshot shows the 'Merge Field' configuration window. The 'Merge Field' is set to 'USERDEF1'. The description is 'Select the name(s) of the person(s) who is living at the property'. The 'Option Type' dropdown is open, showing a list of options: 'Please Select', 'People Full Name', 'People First Name', 'People Address', 'Memo', and 'Date'. There are checkboxes for 'Add Manager Names' and 'Add User Names'. A 'Setup' button is located to the right of the dropdown. The 'Required Field' checkbox is checked. At the bottom, there are 'Save' and 'Cancel' buttons.

If you select **Options** / **Setup** you can configure a list that a user can select from when creating the document.

This screenshot is similar to the previous one, but the 'Options' dropdown and the 'Setup' button are circled in red. The 'Option Type' is set to 'People Full Name'. The 'Required Field' checkbox is checked. At the bottom, there are 'Save' and 'Cancel' buttons.

Droplist Setup

| | | | |
|-----------|------------------------------------|-----------|----------------------|
| Option 1 | <input type="text" value="Red"/> | Option 11 | <input type="text"/> |
| Option 2 | <input type="text" value="Blue"/> | Option 12 | <input type="text"/> |
| Option 3 | <input type="text" value="Green"/> | Option 13 | <input type="text"/> |
| Option 4 | <input type="text"/> | Option 14 | <input type="text"/> |
| Option 5 | <input type="text"/> | Option 15 | <input type="text"/> |
| Option 6 | <input type="text"/> | Option 16 | <input type="text"/> |
| Option 7 | <input type="text"/> | Option 17 | <input type="text"/> |
| Option 8 | <input type="text"/> | Option 18 | <input type="text"/> |
| Option 9 | <input type="text"/> | Option 19 | <input type="text"/> |
| Option 10 | <input type="text"/> | Option 20 | <input type="text"/> |

Merge Field ?

Merge Field:

Description:

Option Type: Add Manager Names Add User Names

Options:

Gifting Options:

Required Field

Notes:

Note on Required Field

If you select 'Required Field' the user must fill in the information when creating the document. This prevents users from missing important information during document creation.

7. Repeat this process for all User Defined merge fields and then **Save**.

CCH iTrust

Wolters Kluwer

Thursday, October 22, 2015

Master Template Merge Fields My Own Document CCH Demo System With Data - Karen Rogers

General

Merge Fields

| Merge Field | Merge Field Name |
|-------------|---|
| USERDEF1 | Select the name(s) of the person(s) who is living at the property |
| USERDEF2 | Select the clients favorite colour |

Notes

Print Summary

Save Cancel

8. Your document will now be ready to use in CCH Entities.

Dashboard Reports Setup Logout

Thursday, October 22, 2015

Master Template Listing CCH Demo System With Data - Karen Rogers

All Templates All Groups Template Search Reset

| Type | Sort Code | Keycode | Name | Created |
|-----------|-----------|-----------|---|------------|
| Precedent | 34 | DEED31 | Deed of Resettlement - specific property | 09/08/2015 |
| Precedent | 35 | DEED32 | Deed of Resettlement and Novation - specific property | 09/08/2015 |
| Precedent | 36 | DEED33 | Deed of Resettlement - entire fund and wind up | 09/08/2015 |
| Letter | 36 | Letter 51 | My Own Document | 22/10/2015 |
| Precedent | 37 | DEED34 | Deed of Resettlement and Novation - entire fund and wind up | 09/08/2015 |
| Precedent | 38 | DEED35 | Deed Bringing Forward Vesting Date | 09/08/2015 |
| Precedent | 39 | DECL03 | Declaration of Solvency on Transfer of Property by Way of Gift to Trust | 10/08/2015 |
| Precedent | 40 | DECL04 | Declaration of Solvency on Forgiveness of Debt | 10/08/2015 |
| Precedent | 41 | CERT01 | Certificate of solvency | 10/08/2015 |
| Precedent | 42 | MEMO01 | Memorandum of Guidance for Trustees - two settlors | 02/08/2015 |
| Precedent | 43 | MEMO02 | Memorandum of Guidance for Trustees - one settlor | 04/08/2015 |
| Precedent | 44 | RELA01 | Relationship Property Agreement - tenancy in common/joint tenancy | 04/08/2015 |
| Precedent | 45 | RELA02 | Relationship Property Agreement - specific property to one partner/spouse | 04/08/2015 |
| Precedent | 46 | RELA03 | Relationship Property Agreement - covering election on death and trusts | 04/08/2015 |
| Precedent | 47 | WILL01a | Will - individuals as executors | 02/08/2015 |
| Precedent | 48 | WILL01b | Will - legal firm as executor | 02/08/2015 |
| Minute | 49 | MINU01 | Minute - minute builder | 10/08/2015 |
| Minute | 50 | MINU02 | Minute - draft format | 10/08/2015 |
| Minute | 51 | MINU03 | Minutes - first meeting of trustees | 23/07/2015 |

Back to Setup

- Finally, if you scroll to the right on the master template list you will see the option to make a document **inactive**. You may want to make the standard version of the document inactive, by checking the box, to ensure your version is always used.

Dashboard Companies Reports Setup About Logout ? CCH Companies

Company Master Template Listing CCH Training (Companies Only) Limited - Suzy Hardy

New

View / Modify

Delete

Copy

Print Summary

Back to Setup

| Sort Code | Keycode | Name | Created | Inactive |
|-----------|-----------|--|-------------------|-------------------------------------|
| 0 | aa01 | My Customised document with merge field | 19/07/2018 | <input type="checkbox"/> |
| 0 | CAGEAN001 | Agenda for Annual Meeting of Shareholders | 07/11/2017 | <input type="checkbox"/> |
| 0 | CAGEAN001 | CCH Agenda for Annual Meeting of Shareholders | 19/07/2018 | <input checked="" type="checkbox"/> |
| 0 | CCERAP15 | Directors' certificate under s 161(4) re remuneration contract | 10/10/2017 | <input type="checkbox"/> |
| 0 | CCERAP16 | Directors' certificate under s 161(4) re fees at end of year | 10/10/2017 | <input type="checkbox"/> |
| 0 | CCERDI03 | Solvency certificate for distribution of dividend (option A - all shareholders) | 21/03/2017 | <input type="checkbox"/> |
| 0 | CCERDI07 | Solvency certificate for distribution of dividend (option B - selected shareholders) | 21/03/2017 | <input type="checkbox"/> |
| 0 | CCERFI04 | Directors' certificate (ss 76(4), 77(2)) - financial assistance | 21/03/2017 | <input type="checkbox"/> |
| 0 | CCERFI08 | Directors' certificate (ss 76(4), 77(2), 78(3)) - financial assistance | 21/03/2017 | <input type="checkbox"/> |
| 0 | CCERFI15 | Directors' certificate (s 108(2)) - financial assistance | 21/03/2017 | <input type="checkbox"/> |

CCH Entities Standard Data Fields
All Firm Bookmarks

| | |
|----------------|--------------|
| Firm Name | «FirmName» |
| Firm Address 1 | «FirmAdd1» |
| Firm Address 2 | «FirmAdd2» |
| Firm Address 3 | «FirmAdd3» |
| Firm Phone 1 | «FirmPhone» |
| Firm Phone 2 | «FirmPhone2» |
| Firm Email | «FirmEmail» |

All Company/Person Bookmarks

| | |
|-------------------|-----------------|
| Full Name | «FullName» |
| First Name | «FirstName» |
| Last Name | «LastName» |
| Title | «Title» |
| PostalAdd1 | «PostalAdd1» |
| PostalAdd2 | «PostalAdd2» |
| PostalAdd3 | «PostalAdd3» |
| PostalAdd4 | «PostalAdd4» |
| PostalZip | «PostalZip» |
| DeliveryAdd1 | «DeliveryAdd1» |
| DeliveryAdd2 | «DeliveryAdd2» |
| DeliveryAdd3 | «DeliveryAdd3» |
| DeliveryAdd4 | «DeliveryAdd4» |
| DeliveryZip | «DeliveryZip» |
| ServiceAdd1 | «ServiceAdd1» |
| ServiceAdd2 | «ServiceAdd2» |
| ServiceAdd3 | «ServiceAdd3» |
| ServiceAdd4 | «ServiceAdd4» |
| ServiceZip | «ServiceZip» |
| Company Name | «CompanyName» |
| Company Number | «CompanyNo» |
| NZ Business No | «NzBusinessNo» |
| Company Type | «CompanyType» |
| Contact Name | «Contact» |
| Phone Number | «PhoneNo» |
| Fax Number | «FaxNo» |
| Mobile Number | «MobileNo» |
| Email Address | «Email» |
| Alternative Phone | «AltPhoneNo» |
| Signing Authority | «SignAuthority» |
| IRD No | «IrdNo» |

| | |
|-----------------------------|-------------------|
| External Reference | «ExtRef» |
| Registered Office | «RegOffice» |
| GST No | «GstNo» |
| Incorporation Date | «IncorpDate» |
| AR Filing Month | «ArMonth» |
| AR Responsible | «ArResponsible» |
| List of Directors | «DirectorList» |
| All Directors | «DirectorAll» |
| Directors list with address | «DirectorListAdd» |
| | |
| Custom Field 1 | «UserDef1» |
| Custom Field 2 | «UserDef2» |
| Custom Field 3 | «UserDef3» |
| | |

«RangeStart:ShareParcels»

| | | | |
|--------------|-----------------|---------------|---------------|
| «ParcelName» | «ParcelAddress» | «ParcelCount» | «ParcelClass» |
|--------------|-----------------|---------------|---------------|

«RangeEnd:ShareParcels»

Signatures

Lawyer Signature

«RangeStart: LawyerSign»

«FullName» (Lawyer)

«RangeEnd: LawyerSign»

Directors Signature (short)

«RangeStart: DirSign»

«FullName» (Director)

«RangeEnd: DirSign»

Directors Signature (Long, with witness)

«RangeStart: DirSign»

«FullName» (Director)

As [insert role, eg Director, Indemnifier] in the presence of:

Signature of witness

Name of witness

City/town of residence

«RangeEnd: DirSign»

Shareholder Signature (short)

«RangeStart: ShareSign»

«FullName» (Shareholder)

«RangeEnd: ShareSign»

User Defined Signature (Long, with witness)

SIGNED by

«UserDef[insert number]»

As [UserDefxx to insert role] in the presence of:

Signature of witness

Name of witness

City/town of residence

User Defined Signature (Short)

«UserDef[insert number]», [insert role if required, eg chairman]

Liquidator Signature

«RangeStart: LiqSign»

«FullName» (Liquidator)

«RangeEnd: LiqSign»

Administrator Signature

«RangeStart: AdminSign»

«FullName» (Administrator)

«RangeEnd: AdminSign»

Accountant Signature

«RangeStart: AccSign»

«FullName» (Accountant)

«RangeEnd: AccSign»

Autorised Signatory

«RangeStart: SigSign»

«FullName» (Authorised Signatory on behalf of «CompanyName»)

«RangeEnd: SigSign»